

# 10 Critical to Success factors in an Intelligent Document Processing (IDP) Solution



From Data Ingestion to Exporting a processed document, be sure your IDP solution works for your desired outcomes. Here is what to look for at every step!

## STEP 1 Data Ingestion

### 1. Downstream integration capabilities

- Check for compatibility with popular document management systems, etc.
- Evaluate the ability to integrate with existing systems, such as content management or CRM platforms

### 2. Security and compliance

- Ensure that the IDP solution meets your organization's data security and compliance requirements. E.g., GDPR, GxP compliance, etc.
- Verify if the solution offers encryption, access controls, and audits for sensitive data handling and ensuring regulatory compliance

## STEP 2 Image Processing and OCR

### 3. Document processing capabilities aligned with your needs

- Evaluate the IDP solution's ability to extract relevant data accurately from the type of documents that you work with
- Look for features like automated data validation, exception handling, and data export options
- Ability to process different document formats such as PDF, images, etc.
- Ability to ingest documents from multiple sources (on-premises/ cloud)
- Assess the solution's capability to handle structured, semi-structured, and unstructured data
- Human-in-the-loop approach for reliability of extracted data

### 4. User experience and training

- Evaluate the solution's user interface and ease of use for both technical and non-technical users
  - Check if the vendor provides comprehensive training and support resources to facilitate implementation and user adoption

## STEP 3 Classification, Extraction, and Validation

### 5. Assess intelligent automation and workflow capabilities

- Check the technology behind the solution. E.g., Is it NLP enabled? Do you need GenAI features?
- Determine if the solution offers intelligent document routing and helps in creating customized processing workflows
- Intelligent Search to find different relevant documents using extracted data & key-value pairs

## STEP 4 Export and Deliver

### 6. Scalability and performance

- Assess if the vendor can continue to provide scalability and service support handle increasing document volumes and types as your organization grows
- Check the solution's processing speed and ability to handle real-time document processing requirements
- Check if the solution can be ported to a cloud of your choice such as AWS, Microsoft Azure, etc.

## STEP 5 Picking the Right Solution

### 7. Define your document processing requirements

- The variety and volume of documents you need to process
- The downstream integration capabilities, and information security requirements at your organization
- Accuracy and processing speed benchmarks for data extraction & processing

### 8. Evaluate the vendor expertise for your domain

- A proven track record within your industry and for your use-cases
- Service quality such as timely customer support and software maintenance.
- A proven client success program

### 9. Total cost of ownership

- Consider the total cost of implementing and maintaining the solution
- Check the pricing models offered by the vendor
- Consider costs such as licensing fees, implementation costs, integration costs, etc.
- Ask about the engagement model (is it SaaS, PaaS, custom build, etc.).
- Explore the commercial structure. E.g., a la carte, pay-per-use, subscription, etc.

### 10. Prioritize your objectives

- Cost reduction
- Productivity improvement and consequent benefits
- Improved security, connectivity and deployment
- Preferred infrastructure - On premise, On Cloud or Hybrid
- Process improvement with high accuracy



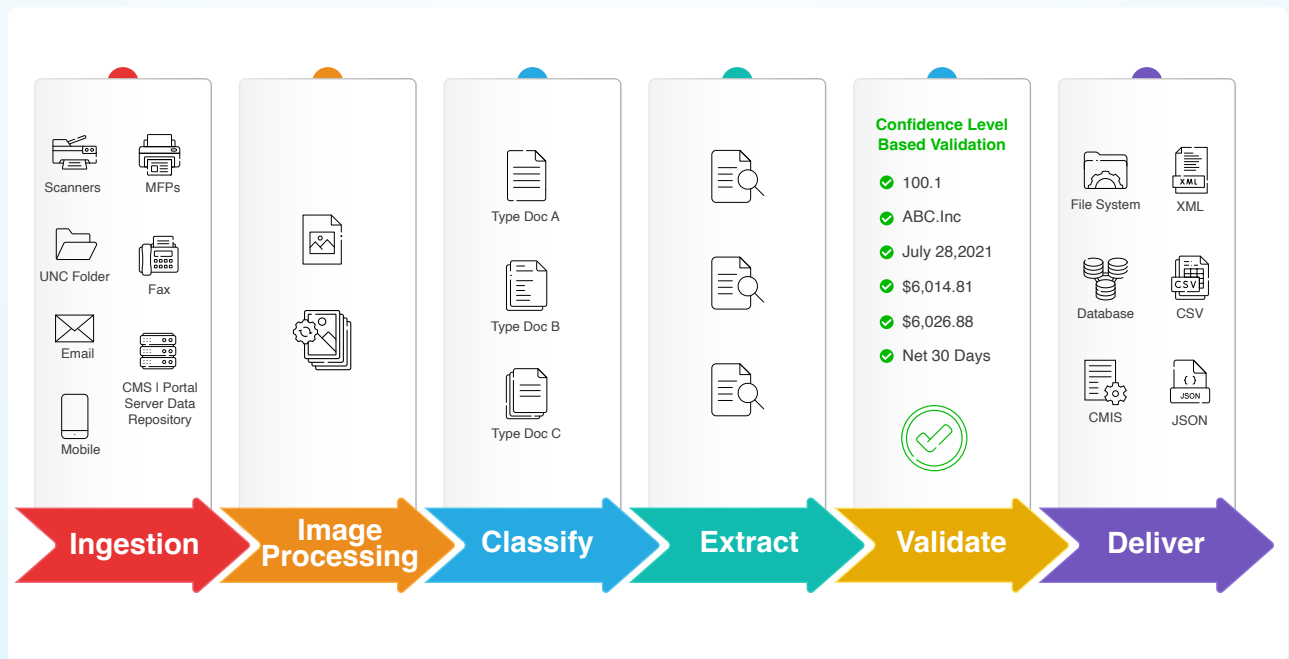
If your aim is to get HIGH ACCURACY in data processing without rushing to implement a quick solution, Doc Genie is your go to solution.

## Achieve > 90% accuracy in data processing with Gramener's GenAI-powered IDP Solution – Doc Genie.


Unlike other solutions in the market that promise quick deployment, 60-70% accuracy and cheaper costs, Doc Genie sets you up for long term success and reliability with high-speed processing and over 90% accuracy in processing of documents.

Based on Optical Character Recognition (OCR) and Generative AI techniques, Doc Genie is helping organizations ingest, classify and extract the documents and store the output without compromising on process speed or accuracy.

Here is what the workflow of the Doc Genie IDP solution looks like:



It includes a Contributor Module for delivering highly accurate data extraction from various document types, completely automating the document processes while accelerating document processing from start to finish.

 **Talk to us for your document processing needs.**  
Reach out on **DOC Genie- gramener.com.**